

Production in 2011

In 2011, 81 rendering establishment plants operated in Australia. Almost 1.2 million tonnes of rendered products were produced from about 2.5 million tonnes of raw material. The total value of rendered products in 2011 was about \$935 million.

All operating rendering plants were surveyed to determine the 2011 production of rendered products. The total production of the various products is shown below:

Table1: Total production of animal protein meals in 2011

Commodity	Production ('000 tonnes)	Value (A\$ '000,000)
Mixed meat and bone meal*	175.4	94.0
Bovine meat and bone meal	298.2	159.8
Ovine meat and bone meals	28.2	25.4
Total meat and bone meal	501.8	279.2
Poultry meal	76.2	67.9
Feather meal	36.6	22.9
Blood meal	23.4	21.2
Total animal protein meal	634.0	391.2

*Includes small amounts of porcine and fish meal

Table 2: Total production of animal fats in 2011

Commodity	Production ('000 tonnes)	Value (A\$ '000,000)
Tallow	487.0	483.1
Poultry oil	59.7	60.5
Total animal fats	546.7	543.6

Table 3: Production of rendered products by state in 2011

State	Number of rendering establishments	Animal protein meals ('000 tonnes)	Animal fats ('000 tonnes)
Queensland	23	265.7	220.1
NSW	23	144.4	135.5
Victoria	13	131.7	107.6
South Australia	7	48.1	39.5
Western Australia	9	37.5	31.2
Tasmania	6	10.6	12.7

Exports and other uses

About 40% of animal protein meals and about 66% of animal fats were exported in 2011. Figures 1 and 2 show the major destinations for Australian animal fats and animal protein meals

Figure 1: Main destinations for animal protein meals in 2011

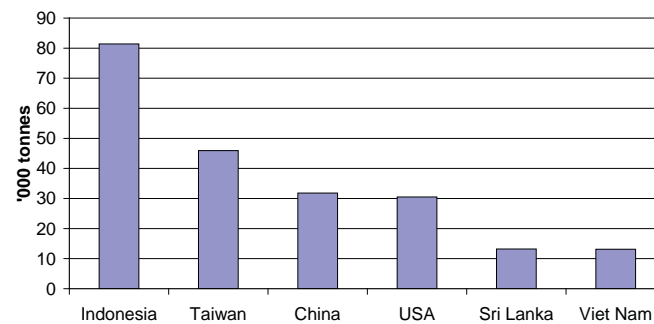
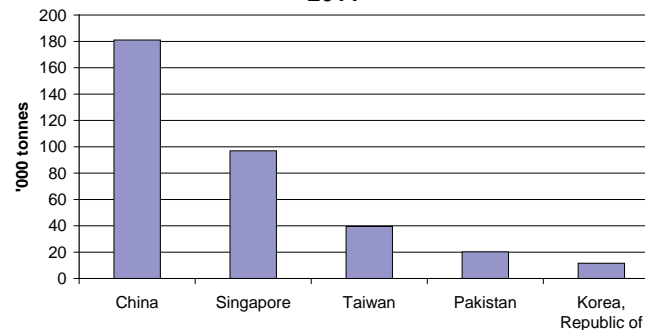


Figure 2: Main destinations for animal fats in 2011



Total export volumes and estimates for the domestic use of animal protein meals and animal fats are shown in Table 4 and 5.

Table 4: Uses of animal protein meals (meat and bone meal, poultry meal, feather meal and blood meal)

Total production	638,000 tonnes
Exports	253,100 tonnes
Domestic poultry feeds (broiler and layer)	207,000 tonnes
Domestic pig feeds	115,000 tonnes
Domestic aquaculture feeds	31,000 tonnes
Domestic pet food	32,000 tonnes

Table 5: Uses of animal fats (tallow and poultry oil)

Total production	546,700 tonnes
Exports	362,200 tonnes
Domestic oleo-chemical and industrial	50,000 tonnes
Domestic edible applications	35,000 tonnes
Domestic intensive animal production	40,000 tonnes
Domestic aquaculture feeds	18,000 tonnes
Domestic pet food	25,000 tonnes
Domestic biodiesel and fuel	15,000 tonnes
Other	1,500 tonnes

Rendering production compared to 2001 and meat production

The ARA conducted a survey of production of rendered products in 2001. In 2001 there were about 120 rendering establishments in Australia compared with the 81 that were operating and were surveyed in 2011.

Cattle, sheep and pig slaughter numbers were higher in 2001 than in 2011. In particular the 2001 sheep slaughter numbers were about three times the 2011 level. The average beef carcass weight was higher in 2011 and beef carcass production weight was higher in 2011, despite the lower kill numbers.

Poultry slaughter numbers in 2011 were almost 40% higher than the 2001 level.

The change in slaughter numbers has affected production of rendered products but other factors have also had an impact. Total production of animal protein meals in 2011 increased by about 42,000 tonnes or

7% higher compared with 2001 production. However, production of meat and bone meal decreased and production of poultry and feather meal increased. This is due to increased segregation of raw material and investment in dedicated poultry processing rendering lines, in addition to the increased production of poultry meat.

In the case of animal fats, 2011 production fell by 47,500 tonnes or 8% compared with 2001 production. Beef carcase weight production was higher in 2011 and the number of cattle on feed was similar in 2001 and 2011 at about 700,000 head according to ALFA quarterly surveys. However the length of time on feed and the fat categories of lot-fed cattle at the time of slaughter could be less in 2011 than in 2001. As with the protein meals, poultry oil production has increased at the expense of tallow.

Tables 6 and 7 summarise production of rendered products in 2001 and 2011 and the corresponding meat production.

Table 6: Production of rendered products in 2001 and 2011

	2001 production (‘000 tonnes)	2011 production (‘000 tonnes)	% change
Mammalian and mixed protein meals	547.7	525.2	-4.1
Poultry meal	45.5	76.2	+67.5
Feather meal	29.1	36.6	+25.8
Tallow	567.2	487.0	-14.1
Poultry oil	25.7	59.7	+132

Table 7: Slaughter numbers and meat production in 2001 and 2011

	2001 slaughter number (‘000 head)	2001 carcase production (‘000 tonnes)	2011 slaughter number (‘000 head)	2011 carcase production (‘000 tonnes)
Adult cattle	7,808.3	2,045.8	7,259.9	2,098.1
Sheep	15,789.3	326.0	4,832.6	129.0
Lambs	17,896.5	352.9	17,792.9	404.3
Pigs	5,171.5	378.2	4,718.7	341.6
Poultry	397,237.3	627.3	546,758.1	1,012.5



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RENDERING FACTS